



Last Updated 2/19/14

Version 2

STATE OF TENNESSEE

EDISON SYSTEM PROCEDURES

Contract Notifications — Understanding Contract Notifications

A.1. Understanding Contract Notifications

Supplier Contracts > Create Contracts and Documents > Contract Entry

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

The screenshot shows the 'Contract Entry' page in a web application. On the left is a navigation menu with categories like 'Manager Self Service', 'FSCM', 'TN Conversions', 'Supplier Contracts', 'Create Contracts and Documents', 'Contract Entry', 'Document Management', 'My Contacts / Collaborators', 'Monitor and Update Agreements', 'Manage Contract Library', 'Supplier Contracts Setup', 'Search Content', 'Contract Release Processes', 'Related Links', 'Products', 'Customer Contracts', 'Items', 'Cost Accounting', 'Vendors', and 'Purchasing'. The 'Contract Entry' option is selected. The main content area is titled 'Contract Entry' and includes the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (active) and 'Add a New Value'. Below the tabs is a search form with the following fields: 'Limit the number of results to (up to 300):' with a value of 300; 'SetID:' with a dropdown set to '=' and a text box containing 'SHARE'; 'Contract ID:' with a dropdown set to 'begins with' and a text box containing '000000000000000029450'; 'Contract Process Option:' with a dropdown set to '=' and an empty text box; 'Short Vendor Name:' with a dropdown set to 'begins with' and an empty text box; and 'Master Contract ID:' with a dropdown set to 'begins with' and an empty text box. At the bottom of the form are buttons for 'Search' (yellow), 'Clear' (yellow), 'Basic Search' (blue), and 'Save Search Criteria' (green). Below the buttons are links for 'Find an Existing Value' and 'Add a New Value'.

Step	Action
1	Click the Find an Existing Value tab
2	NOTE: Set ID will default as SHARE
3	Key in Contract ID
4	Click the Search button.

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)

My Page

Payroll

HR

Benefits

TBL

ELM

Finance

Procurement

Logistics

Training

TN Enhancements

Employee Self-Service

Manager Self-Service

HCM

FSCM

TN Conversations

Supplier Contracts

Create Contracts and Documents

Contract Entry

Document Management

My Contract/J Collaboration

Monitor and Update Agreements

Manage Contract Librar

Supplier Contracts Set

Search Content

Contract Release Processes

Syndication and Messaging

Related Links

Products

Customer Contracts

Items

Cost Accounting

Vendors

Purchasing

Inventory

eProcurement

Services Procurement

Sourcing

Demand Planning

Grants

Program Management

Project Costing

Travel and Expenses

Billing

Accounts Receivable

Accounts Payable

New User

Contract

Create Release

Review Release

SetID: SHARE

*Status: Approved

Contract ID: 000000000000000000000029460

Contract Type: SVC (FAI) type Contract

Administration: jarea0705001

Jeremy A Gross

Authorized Document

Authorized Status: Draft

Version: 0.04

Amendment: 0

Maintain Document

Header

Process Option: Purchase Order

Edit Comments

Active Log

Vendor: LAWRENCE C-001

Contract Activities

Document Status

Vendor ID: 000000001

General Sessions Court

Primary Contact Info

Thresholds & Notifications

Begin Date: 11/12/2011

Vendor Details

Contract Agreement

Release Conditions

Expire Date: 11/30/2011

Sub Contractor

Amount Summary

Currency: USD CRR/IT

Maximum Amount: 1,000.00 USD

Primary Contact:

Line Released: 0.00

Vendor Contract Ref:

Open Item Relat: 0.00

Description:

Total Released Amount: 0.00

Master Contract ID:

Remaining Amount: 1,000.00

☐ Tax Exempt

Supplier Type: Vendor

Remaining Percent: 100.00

☐ SWC Nbr

Order Contract Options

☐ Allow Multicurrency PO

☐ Allow Open Item Reference

☐ Must Use Contract Rate Date

☒ Corporate Contract

☐ Adjust Vendor Pricing First

Rate Date: 11/12/2011

☐ Lock Charfields

☐ Price Can Be Changed on Order

P.O. Defaults

P.O. Open Item Pricing

3

A.2. Expire Notifications

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

Contract Entry

Thresholds & Notifications

☒ **Notify on Expiry/Exceeds Max**

Buyer:

Expiration Date Notification

Notify Buyer when contract is within specified days of expiring.

Expire Date:

Notify Days Before Expires:

Notification Date:

Maximum Amount Notification

Notify Buyer when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: USD

Percent Less than Maximum:

Notification Amount:

Amount Summary

Maximum Amount:	1,000.00	USD
Total Line Released Amount:	0.00	
Open Item Amount Released:	0.00	
Total Released Amount:	0.000	
Remaining Amount:	1,000.000	
Remaining Percent:	100.00	

OK Cancel Refresh

Step	Action
8	A single Notification will be generated on the calculated Notification Date .
9	The Notifications Date is calculated based on how many days less than the Expiration Date you wish to be notified.
10	<p>If the "Notify Days Before Expires" field is blank, then the Notification will generate on the Expire Date.</p> <p>If no value is entered in the "Notify Days Before Expires", the value is considered "0" days less than the Contract Expire date. Thus, zero days less than the Expire Date is the expiration date.</p>

A.3. Maximum Amount Notification

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

Step	Action
11	A Notification will be generated every time the Notification Process runs and the Total Released Amounts are greater than or equal to the Notification Amount .
12	A Notification will be generated every day the criteria is true for the Notification Amount .
13	The Notification Amount is based on the percentage less than the Maximum Amount to spend on the Contract or a designated amount.
14 **	<p>If the Notification Amount field is blank, then the Notification will generate when the Released Amount equals the Maximum Amount of the Contract. It will generate each day the Notification is selected and there is no Available Amount on the Contract.</p> <p>If no value is entered in the "Notification Amount", the value is considered "0" percent and also when an amount less than the Maximum Amount is entered. Thus, zero percent or dollars less than the Maximum Amount is the maximum amount.</p> <p>Please put the maximum amount of your contract in the "Amount Less than Maximum" field to prevent unwanted emails.</p>

A.4. Threshold and Notification Considerations

*Supplier Contracts > Create Contracts and Documents > Contract Entry (**Thresholds and Notifications**)*

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

Step	Action
15	Only one criterion must be met for a Notification to be generated.
16	The page's fields are " Open " and available for change regardless of the Contract's status.
17	<p>Once a Notification is generated and the Notification is in a worklist, the Notification can be removed from the worklist. To remove the worklist Notification, the user should perform the following:</p> <ol style="list-style-type: none">1. Click on the link on the worklist Notification2. User will be taken to the Contract page3. Click Save on the Contract4. The worklist Notification is removed

20	<p>For Contracts that do not have a Maximum Amount (such as unlimited amount Contracts or Statewide Contracts), the Amount Notification will be irrelevant. Since there is no amount to reach for a Threshold Notification, the Notification will never be generated based on the Amount Notification. A buyer may still use the Expire Notifications for these types of Contracts.</p>
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A.4. Threshold and Notification Considerations cont.

*Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications-**Notify on Expire/Exceeds Max**)*

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

Contract Entry - Microsoft Internet Explorer provided by State of Tennessee

https://www.edison.tn.gov/psppaprd_2/EMPLOYEE/ERP/c/CONTRACT_MGMT_CS_CONTRACT_ENTRY.GBL?Page=CS_CNTRCT_HDR&Action=U&CNTRCT_ID=0000000000

Contract Entry

The State of Tennessee's Enterprise Resource Planning Solution

My Links Select One: Search Go! Home Sign out (closes window)

Welcome Jeremy A Gross

My Page Payroll HR Benefits T&L ELM Finance Procurement Logistics Training

Contract Entry

Thresholds & Notifications

☒ Notify on Expired/Exceeds Max

Buyer: jerem0705001 Jeremy A Gross

Expiration Date Notification

Notify Buyer when contract is within specified days of expiring.

Expire Date: 11/30/2011

Notify Days Before Expires:

Notification Date:

Maximum Amount Notification

Notify Buyer when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: USD

Percent Less than Maximum:

Notification Amount:

Amount Summary

Maximum Amount:	1,000.00	USD
Total Line Released Amount:	0.00	
Open Item Amount Released:	0.00	
Total Released Amount:	0.000	
Remaining Amount:	1,000.000	
Remaining Percent:	100.00	

OK Cancel Refresh

21	Checkbox titled “Notify on Expire/Exceeds Max” needs to be selected
22	<p>Buyer (Contract Administrator)</p> <p>The buyer cannot be assigned specifically for the Notification. The buyer is the Contract Administrator. If the buyer “Name” is changed, it will also change the Contract Administrator Name on the Contract as well.</p>

A.4. Threshold and Notification Considerations cont.

*Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications) > **Expire Notifications***

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

EXAMPLE 1.

Contract Entry - Microsoft Internet Explorer provided by State of Tennessee

https://www.edison.tn.gov/psppaprd_2/EMPLOYEE/ERP/c/CONTRACT_MGMT_CS_CONTRACT_ENTRY.GBL?Page=CS_CNTRCT_HDR&Action=U&CNTRCT_ID=0000000000

Contract Entry

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My Links Select One: Search Go! Home Sign out (closes window)

Welcome Jeremy A Gross

My Page Payroll HR Benefits T&L ELM Finance Procurement Logistics Training

Contract Entry

Thresholds & Notifications

☒ Notify on Expired/Exceeds Max

Buyer: jerea0705001 Jeremy A Gross

Expiration Date Notification

Notify Buyer when contract is within specified days of expiring.

Expire Date: 11/30/2011

Notify Days Before Expires: 30

Notification Date: 10/31/2011

Maximum Amount Notification

Notify Buyer when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: 100.00 USD

Percent Less than Maximum: 10.00

Notification Amount: 900.00

Amount Summary

Maximum Amount:	1,000.00 USD
Total Line Released Amount:	0.00
Open Item Amount Released:	0.00
Total Released Amount:	0.000
Remaining Amount:	1,000.000
Remaining Percent:	100.00

OK Cancel Refresh

23

Example 1

Expire Notification – A single **Notification** will be generated on the **Notification Date** of 10/31/11 from the **Expire Notification**

24	<p>Maximum Amount Notification – No Notification will be generated based on the Max Amount Notification at this time.</p> <p>A Notification will be generated once and if the Total Released is \$900.00 or greater. The Notification will be generated every time the Notification Process runs and the Total Released Amounts are greater than or equal to the Notification Amounts.</p>
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A.4. Threshold and Notification Considerations cont.

*Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications) > **Expire Notifications – Notification Amount Blank***

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

EXAMPLE 2.

Contract Entry - Microsoft Internet Explorer provided by State of Tennessee

https://www.edison.tn.gov/psppagrd_2/EMPLOYEE/ERP/c/CONTRACT_MGMT.CS_CONTRACT_ENTRY.GBL?Page=CS_CNTRCT_HDR&Action=U&CNTRCT_ID=000000000000

Contract Entry

The State of Tennessee's Enterprise Resource Planning Solution

My Links Select One Search Go! Home! Sign out (closes window)

Welcome Jeremy A Gross

New Window | Help | Customize Page | Help

My Page Payroll HR Benefits T&L ELM Finance Procurement Logistics Training

Contract Entry

Thresholds & Notifications

☒ Notify on Expired/Exceeds Max

Buyer: jerea0705001 Jeremy A Gross

Expiration Date Notification

Notify Buyer when contract is within specified days of expiring.

Expire Date: 11/30/2011

Notify Days Before Expires: 30

Notification Date: 10/31/2011

Maximum Amount Notification

Notify Buyer when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: USD

Percent Less than Maximum:

Notification Amount:

Amount Summary

Maximum Amount:	1,000.00	USD
Total Line Released Amount:	0.00	
Open Item Amount Released:	0.00	
Total Released Amount:	0.00	
Remaining Amount:	1,000.00	
Remaining Percent:	100.00	

OK Cancel Refresh

25

Example 2

Expire Notification – A single **Notification** will be generated on the **Notification Date** of 10/31/11 from the **Expire Notification**

26	<p>Maximum Amount Notification – No Notification will be generated based on the Max Amount Notification at this time. Though the Notification Amount is blank, the value is actually \$1,000.00. <i>See explanation in the next section.</i></p> <p>A Notification will be generated once and if the Total Released is \$1,000.00 or)the Contract's Full Maximum Amount</p> <p>The Notification will be generated every time the Notification Process runs and the Total Released Amounts are greater than or equal to the Notification Amounts.</p>
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A.4. Threshold and Notification Considerations cont.

*Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications) > **Expire Notifications – Notification Amount Blank***

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

EXAMPLE 2 - Blank Field Explanation

Contract Entry - Microsoft Internet Explorer provided by State of Tennessee

https://www.edison.tn.gov/psp/paprd_2/EMPLOYEE/ERP/c/CONTRACT_MGMT_CS_CONTRACT_ENTRY.GBL?Page=CS_CNTRCT_HDR&Action=U&CNTRCT_ID=0000000000

Contract Entry

The State of Tennessee's Enterprise Resource Planning Solution

Welcome Jeremy A Gross

My Links Select One: Search Go! Home Sign out (closes window)

My Page Payroll HR Benefits T&L ELM Finance Procurement Logistics Training

Contract Entry

Thresholds & Notifications

☒ Notify on Expired/Exceeds Max

Buyer: jerea0705001 Jeremy A Gross

Expiration Date Notification

Notify Buyer when contract is within specified days of expiring.

Expire Date: 11/30/2011

Notify Days Before Expires: 0

Notification Date:

Maximum Amount Notification

Notify Buyer when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: 0 USD

Percent Less than Maximum: 0

Notification Amount:

Amount Summary

Maximum Amount:	1,000.00	USD
Total Line Released Amount:	0.00	
Open Item Amount Released:	0.00	
Total Released Amount:	0.000	
Remaining Amount:	1,000.000	
Remaining Percent:	100.00	

OK Cancel Refresh

27

Example 2. Blank Field Explanation

Blank Fields for Notify Days Before Expires, Amount Less than Maximum and Percent Less Than Max represents the value of zero ("0").

28	<p>Expiration Date Notification – Since blank field is zero, “0” Days less than the Expire Date would be the Expire Date. A Notification would be generated on 11/30/2011 (the actual expiration date).</p> <p>Maximum Amount Notification - Since blank field is zero, “0” Amount Less than or Percent Less than the Maximum Amount is the Full Maximum Amount. A Notification would be generated when the Total Released Amount is \$1,000.00 (the Maximum Amount).</p>
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A.4. Threshold and Notification Considerations cont.

Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications)>Expire Notifications – Notification Amount Blank

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

EXAMPLE 2 - Blank Field Explanation cont.

The screenshot shows the 'Contract Entry' page in the Edison ERP system. The 'Thresholds & Notifications' section is active. The 'Notify on Expired/Exceeds Max' checkbox is checked. The 'Buyer' is 'jereao705001' (Jeremy A Gross). The 'Expiration Date Notification' section shows an 'Expire Date' of 11/30/2011 and 'Notify Days Before Expires' of 0. The 'Notification Date' is blank. The 'Maximum Amount Notification' section shows 'Amount Less than Maximum' as 0 USD and 'Percent Less than Maximum' as 0. The 'Amount Summary' table shows a 'Maximum Amount' of 1,000.00 USD, a 'Total Line Released Amount' of 0.00, and a 'Total Released Amount' of 0.000. The 'Remaining Amount' is 1,000.000 and the 'Remaining Percent' is 100.00.

Amount Summary	
Maximum Amount:	1,000.00 USD
Total Line Released Amount:	0.00
Open Item Amount Released:	0.00
Total Released Amount:	0.000
Remaining Amount:	1,000.000
Remaining Percent:	100.00

29	<p>Example 2. Blank Field Explanation cont.</p> <p>The above screen shows the Notification Date and Notification Amount as if an Actual zero "0" was entered.</p>
30	<p>Expiration Date Notification – the Expire Date</p> <p>Maximum Amount Notification – the Maximum Amount of the Contract</p>

A.4. Threshold and Notification Considerations cont.

*Supplier Contracts > Create Contracts and Documents > Contract Entry (Thresholds and Notifications) > **Expire Notifications – Notification Amount Blank***

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

EXAMPLE 3 – Expire Notification

Contract Entry - Microsoft Internet Explorer provided by State of Tennessee

https://www.edison.tn.gov/psppaprd_2/EMPLOYEE/ERP/c/CONTRACT_MGMT_CS_CONTRACT_ENTRY.GBL?Page=CS_CNTRCT_HDR&Action=U&CNTRCT_ID=000000000000

Contract Entry

The State of Tennessee's Enterprise Resource Planning Solution

My Links Select One: Search Go! Home Sign out (closes window)

Welcome Jeremy A Gross

New Window | Help | Customize Page | Help

My Page Payroll HR Benefits T&L ELM Finance Procurement Logistics Training

Contract Entry

Thresholds & Notifications

☒ Notify on Expiry Exceeds Max

Buyer: jerea0705001 Jeremy A Gross

Expiration Date Notification

Notify Buyer when contract is within specified days of expiring.

Expire Date: 11/30/2011

Notify Days Before Expires:

Notification Date: 11/30/2011

Maximum Amount Notification

Notify Buyer when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: USD

Percent Less than Maximum:

Notification Amount: 1,000.00

Amount Summary

Maximum Amount:	1,000.00 USD
Total Line Released Amount:	0.00
Open Item Amount Released:	0.00
Total Released Amount:	0.00
Remaining Amount:	1,000.00
Remaining Percent:	100.00

OK Cancel Refresh

29	<p>Example 3. Expire Notification</p> <p>Expire Notification – A single Notification will be generated on the Notification Date of 11/30/11 from the Expire Notification</p>
30	<p>Maximum Amount Notification – A Notification will be generated once and if the Total Released Amount is \$900.00 or greater.</p> <p>The Notification will be generated every time the Notification Process runs and the Total Released Amounts is greater than or equal to the Notification Amounts.</p>

A.5. Threshold and Notification Considerations cont.

Worklist > Detail View

Edison Role: TN2_PU_CN_AGCY_CONTRACT_ADMIN

EXAMPLE 4 - Worklist Notification

The screenshot shows the Edison Worklist interface in a Microsoft Internet Explorer browser. The page title is "Worklist - Microsoft Internet Explorer provided by State of Tennessee". The URL is "http://ag0319006lw008.nash.tenn.gov/psp/f589pmt/EMPLOYEE/ERP/w/WORKLIST?ICAction=ICViewWorklist&Menu=Worklist&Market=GBL&PanelGroupName=WORKLIST". The page displays a worklist for user "jerea0705001: Jeremy A Gross". The worklist table has columns: From, Date From, Work Item, Worked By Activity, Priority, Link, and actions (Mark Worked, Reassign). The first row is circled in red.

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
ERP_BATCH	08/23/2011	Contract Threshold	Expiring Contracts / Max \$		00000000000000000000000028393, SHARE_2011-08-31_0000000001, jerea0705001		
ERP_BATCH	08/22/2011	Contract Threshold	Expiring Contracts / Max \$		00000000000000000000000028396, SHARE_2011-08-31_0000000001, jerea0705001		
ERP_BATCH	08/22/2011	Contract Threshold	Expiring Contracts / Max \$		00000000000000000000000028393, SHARE_2011-08-31_0000000001, jerea0705001		
ERP_BATCH	08/19/2011	Contract Threshold	Expiring Contracts / Max \$		00000000000000000000000028393, SHARE_2011-08-31_0000000001, jerea0705001		
ERP_BATCH	08/19/2011	Contract Threshold	Expiring Contracts / Max \$		00000000000000000000000028395, SHARE_2011-08-31_0000000001, jerea0705001		
ERP_BATCH	08/19/2011	Contract Threshold	Expiring Contracts / Max \$		00000000000000000000000028394, SHARE_2011-08-31_0000000001, jerea0705001		
William K Beecroft	08/09/2011	Transaction Approved	Approval Workflow		SP_WORKORDER, BUSINESS_UNIT:31701, WORK_ORDER_ID:00000000745000, 7339		
William K Beecroft	08/05/2011	Transaction Approved	Approval Workflow		SP_WORKORDER, BUSINESS_UNIT:31701, WORK_ORDER_ID:00000000225009, 7325		
William K Beecroft	08/05/2011	Transaction Approved	Approval Workflow		SP_WORKORDER, BUSINESS_UNIT:31701, WORK_ORDER_ID:00000000604001, 7329		
William K Beecroft	08/05/2011	Transaction Approved	Approval Workflow		SP_WORKORDER, BUSINESS_UNIT:31701, WORK_ORDER_ID:00000000538004, 7327		
William K Beecroft	08/05/2011	Transaction Approved	Approval Workflow		SP_WORKORDER, BUSINESS_UNIT:31701, WORK_ORDER_ID:00000000478005, 7327		

31

Example 4. Worklist Notification

Worklist Notification – Expire Notification will be generated in the Contract Administrator's **Worklist** for each **Contract**.

